

**UNITED STATES HOUSE OF REPRESENTATIVES
CALENDAR YEAR 2010 FINANCIAL DISCLOSURE STATEMENT**

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For use by Members, officers, and employees

HAND DELIVERED

Peter Welch

2022254115

(Full Name)

(Daytime Telephone)

LEGISLATIVE RESOURCE CENTER

2011 MAY 13 PM 1:44

(Office Use Only)

Filer Status

☒ Member of the U.S. House of Representatives

State: VT

District: AL

☐ Officer Or Employee

Employing Office:

Report Type

☒ Annual (May 15)

☐ Amendment

☐ Termination

Termination Date:

A \$200 penalty shall be assessed against anyone who files more than 30 days late.

PRELIMINARY INFORMATION – ANSWER EACH OF THESE QUESTIONS

<p>I. Did you or your spouse have "earned" income (e.g., salaries or fees) of \$200 or more from any source in the reporting period? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If yes, complete and attach Schedule I.</p>	<p>VI. Did you, your spouse, or a dependent child receive any reportable gift in the reporting period (i.e., aggregating more than \$335 and not otherwise exempt)? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, complete and attach Schedule VI.</p>
<p>II. Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article in the reporting period? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, complete and attach Schedule II.</p>	<p>VII. Did you, your spouse, or a dependent child receive any reportable travel or reimbursements for travel in the reporting period (worth more than \$335 from one source)? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, complete and attach Schedule VII.</p>
<p>III. Did you, your spouse, or a dependent child receive "unearned" income of more than \$200 in the reporting period or hold any reportable asset worth more than \$1,000 at the end of the period? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If yes, complete and attach Schedule III.</p>	<p>VIII. Did you hold any reportable positions on or before the date of filing in the current calendar year? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, complete and attach Schedule VIII.</p>
<p>IV. Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset in a transaction exceeding \$1,000 during the reporting period? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If yes, complete and attach Schedule IV.</p>	<p>IX. Did you have any reportable agreement or arrangement with an outside entity? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, complete and attach Schedule IX.</p>
<p>V. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If yes, complete and attach Schedule V.</p>	<p>Each question in this part must be answered and the appropriate schedule attached for each "Yes" response.</p>

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION – ANSWER EACH OF THESE QUESTIONS

<p>Trusts--</p>	<p>Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?</p>	<p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>
<p>Exemptions--</p>	<p>Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.</p>	<p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>

SCHEDULE I - EARNED INCOME

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List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. Government) totaling \$200 or more during the preceding calendar year. For a spouse, list the source and amount of any honoraria; list only the source for other spouse earned income exceeding \$1,000.

Source	Type	Amount
Orange Supervisor/Union	Spouse Salary	N/A
Sharon Academy	Spouse Salary	N/A
State of Vermont	Spouse Salary	N/A

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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<p>BLOCK A</p> <p>Asset and/or Income Source</p> <p>Identify (a) each asset held for investment or production of income with a fair market value exceeding \$1,000 at the end of the reporting period, and (b) any other reportable asset or sources of income which generated more than \$200 in "unearned" income during the year.</p> <p>Provide complete names of stocks and mutual funds (do not use ticker symbols.)</p> <p>For all IRAs and other retirement plans (such as 401(k) plans) that are self-directed (i.e., plans in which you have the power, even if not exercised, to select the specific investments), provide the value for each asset held in the account that exceeds the reporting thresholds. For retirement accounts which are not self-directed, provide only the name of the institution holding the account and its value at the end of the reporting period.</p> <p>For rental or other real property held for investment, provide a complete address.</p> <p>For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A.</p> <p>Exclude: Your personal residence, including second homes and vacation homes (unless there was rental income during the reporting period); any deposits totaling \$5,000 or less in a personal checking or</p>	<p>BLOCK B</p> <p>Year-End Value of Asset</p> <p>at close of reporting year. If you use a valuation method other than fair market value, please specify the method used. If an asset was sold and is included only because it is generated income, the value should be "None."</p>	<p>BLOCK C</p> <p>Type of Income</p> <p>Check all columns that apply. For retirement accounts that do not allow you to choose specific investments or that generate tax-deferred income (such as 401(k) plans or IRAs), you may check the "None" column. Dividends, interest, and capital gains, even if reinvested, must be disclosed as income. Check "None" if the asset generated no income during the reporting period.</p>	<p>BLOCK D</p> <p>Amount of Income</p> <p>For retirement accounts that do not allow you to choose specific investments or that generate tax-deferred income (such as 401(k) plans or IRAs), you may check the "None" column. For all other assets, indicate the category of income by checking the appropriate box below. Dividends, interest, and capital gains, even if reinvested, must be disclosed as income. Check "None" if no income was earned or generated.</p>	<p>BLOCK E</p> <p>Transaction</p> <p>Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.</p>
10 Acres Land Hartland	\$15,001 - \$50,000	None	NONE	
131 Main Burlington, VT	\$100,001 - \$250,000	RENT	\$5,001 - \$15,000	
3M Company	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	P
Aflac	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
American Century Cap.	\$100,001 - \$250,000	DIVIDENDS	\$1 - \$200	
American Express	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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	American General Life	\$100,001 - \$250,000	DIVIDENDS	\$15,001 - \$50,000	
	Ameritrade Money MKT	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	
	AMR	\$100,001 - \$250,000	CAPITAL GAINS	\$15,001 - \$50,000	S(part)
	AMR Call Dec 8	None	CAPITAL GAINS	\$5,001 - \$15,000	PS
	AT&T	None	CAPITAL GAINS	\$1,001 - \$2,500	PS
	Australian Bonds	None	DIVIDENDS/CAPITAL GAINS	\$1,001 - \$2,500	PS
	Bank N.Y.	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	Bear Sterns Bond	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	Becton Dickinson	None	CAPITAL GAINS	\$1,001 - \$2,500	PS
	BHP Billiton	None	CAPITAL GAINS	\$1 - \$200	S
	Biotech SPDR	\$1,001 - \$15,000	None	NONE	P
	Biotech SPDR	\$1,001 - \$15,000	CAPITAL GAINS	\$201 - \$1,000	S(part)
	BP, PLC	None	CAPITAL GAINS	\$201 - \$1,000	PS
	Caterpillar Bond	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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	Caterpillar Bond	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	Cisco	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	P
	Coca Cola	None	DIVIDENDS/CAPIT AL GAINS	\$201 - \$1,000	S
	Cons. Discretionary SPDR	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	P
	Consumer Staple SPDR	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	CREF EQ Index	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	CREF Global	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	
	CREF Growth	\$50,001 - \$100,000	DIVIDENDS	\$1,001 - \$2,500	
	CREF Money MKT	\$50,001 - \$100,000	DIVIDENDS	\$1 - \$200	
	CREF Stock	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	Dow Chem Bond	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	EMC Corp	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	
	Energy SPDR	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	
	EQA SPDR Jan 75	None	CAPITAL GAINS	\$5,001 - \$15,000	PS

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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	FID Cap Inc	\$50,001 - \$100,000	DIVIDENDS	\$1 - \$200	P
	FID Cash Res	\$500,001 - \$1,000,000	DIVIDENDS	\$1 - \$200	
	FID Contra	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	P
	FID CONV. Sec	\$100,001 - \$250,000	DIVIDENDS	\$1 - \$200	P
	FID Growth	\$100,001 - \$250,000	DIVIDENDS	\$1 - \$200	P
	FID Japan Fund	None	DIVIDENDS	\$1 - \$200	S
	FID Japan Small Co	None	DIVIDENDS	\$1 - \$200	S
	FID Lo Price Stock	None	DIVIDENDS/CAPIT AL GAINS	\$5,001 - \$15,000	S
	FID Mid Cap	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	P
	FID Muni Mkt	\$100,001 - \$250,000	DIVIDENDS	\$1 - \$200	P
	FID Utility	\$15,001 - \$50,000	DIVIDENDS/CAPIT AL GAINS	\$201 - \$1,000	
	First Southern	None	DIVIDENDS	\$201 - \$1,000	S
	GE	\$15,001 - \$50,000	DIVIDENDS/CAPIT AL GAINS	\$1 - \$200	S(part)
	GE Bond 2014	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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	GE Bond 2016	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	Global USX China	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	High Yield (JNK)	\$100,001 - \$250,000	DIVIDENDS/CAPITAL GAINS	\$15,001 - \$50,000	S(part)
	Household Fin Corp Bond	None	DIVIDENDS/INTEREST	\$1 - \$200	S
	iBoxx High Yield	None	DIVIDENDS/CAPITAL GAINS	\$201 - \$1,000	S
	INDUSTRIAL SPDR	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Intel	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	International Lease FinCorp Bond	None	DIVIDENDS	\$1 - \$200	S
	Int'l Midcap	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares 1-3 Year Credit Bond	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	
	iShares Australia	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares Barclay 1-3 Treasury Year Bonds	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	
	iShares Barclay Agg Bond Fd	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares Barclay Tips Bond	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	

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	iShares Boxx Inv Grade Bond	None	CAPITAL GAINS	\$1 - \$200	PS
	iShares Brazil	None	DIVIDENDS/CAPITAL GAINS	\$50,001 - \$100,000	S(part)
	iShares Brazil	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares Canada	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares EAFE	None	DIVIDENDS	\$1 - \$200	S
	iShares Emerg Market	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares FTSE China	None	CAPITAL GAINS/DIVIDENDS	\$201 - \$1,000	S
	iShares Global Cl. Energy	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares Global Consumer	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares Global Steel	None	DIVIDENDS	\$1 - \$200	S
	iShares Global Steel	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares iBoxx Bond	None	CAPITAL GAINS	\$1 - \$200	S(part)
	iShares iBoxx Investment Grade Bond	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares Japan	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	

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	iShares Midcap	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares S Korea	None	CAPITAL GAINS	\$1,001 - \$2,500	PS
	iShares Small Cap	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares Taiwan	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares TIPS	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	iShares US Health Provider	None	CAPITAL GAINS	\$1 - \$200	S
	iShares US Healthcare	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	
	iShares US Home Construction	None	DIVIDENDS	\$1 - \$200	S
	iShares US Med Device	None	CAPITAL GAINS	\$201 - \$1,000	S
	iShares US Medical	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares US Oil	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares US Pharmacy	None	CAPITAL GAINS	\$201 - \$1,000	S
	iShares US Pharmacy	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	iShares Util Call Aug 31	None	CAPITAL GAINS	\$1,001 - \$2,500	PS

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	iShares Util Call May 30	None	CAPITAL GAINS	\$5,001 - \$15,000	PS
	iShares Utilities	\$50,001 - \$100,000	DIVIDENDS	\$5,001 - \$15,000	S(part)
	J.P. Morgan Chase	\$100,001 - \$250,000	CAPITAL GAINS	\$5,001 - \$15,000	S(part)
	JANUS worldwide	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	JNK	\$50,001 - \$100,000	INTEREST	\$15,001 - \$50,000	
	KBE INS SPDR	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	KBW INS SPDR	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	LSI	\$100,001 - \$250,000	None	NONE	S(part), P
	Market Vectors Agri	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Material Sector SPDR	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	McGraw Hill Bond	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	Medtronic	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	P
	Microsoft	None	DIVIDENDS	\$1 - \$200	PS
	Monument Life	\$15,001 - \$50,000	DIVIDENDS	\$5,001 - \$15,000	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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	North Gov't Select	\$1,001 - \$15,000	None	NONE	
	Northern Gov't Sec	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Northern TR.RE	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Oracle	None	DIVIDENDS/CAPIT AL GAINS	\$201 - \$1,000	PS
	Power Shares China	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Power Shares Dynamic Network	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Power Shares Global EW	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Power Shares Global Steel	None	DIVIDENDS/CAPIT AL GAINS	\$1 - \$200	PS
	Power Shares Network	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Power Shares TR Water	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Power Shares Water	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Power Shares Wilder Energy	None	DIVIDENDS	\$1 - \$200	S
	Proctor Gamble	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	S(part)
	Revere Natural Gas	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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	Rite Aid	\$15,001 - \$50,000	None	NONE	
	S&P Mid Cap	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Schwab Money Mkt	\$250,001 - \$500,000	DIVIDENDS	\$201 - \$1,000	
	SPDR Industrial	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	SPDR Midcap 400	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	SPDR Tech	\$15,001 - \$50,000	DIVIDENDS/CAPIT AL GAINS	\$201 - \$1,000	S(part)
	St. Germain Cash	\$100,001 - \$250,000	DIVIDENDS	\$1 - \$200	
	Target	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Tech SPDR	None	DIVIDENDS/CAPIT AL GAINS	\$1 - \$200	S(part)
	Texas Instruments	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	Tiaa Trad	\$100,001 - \$250,000	DIVIDENDS	\$2,501 - \$5,000	
	UPS	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	US Air Call Aug 10	None	CAPITAL GAINS	\$2,501 - \$5,000	PS
	US Air Call July 9	\$1,001 - \$15,000	CAPITAL GAINS	\$2,501 - \$5,000	S(part)

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

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	US Air Call Mar 8	None	CAPITAL GAINS	\$2,501 - \$5,000	PS
	US Airways	\$100,001 - \$250,000	CAPITAL GAINS	NONE	PS(part)
	Vanguard EVR/PAC	\$15,001 - \$50,000	DIVIDENDS	\$201 - \$1,000	
	Vanguard TTL MXT Index	\$100,001 - \$250,000	DIVIDENDS	\$1 - \$200	P
	Verizon	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	PS(part)
	VSECU Savings	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
	VZ Comm Bond	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	Wells Fargo Bond	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	West Union Bond	\$1,001 - \$15,000	DIVIDENDS	\$201 - \$1,000	
	Wisom TR. RE International Midcap	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	

SCHEDULE IV - TRANSACTIONS

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Report any purchase, sale, or exchange by you, your spouse, or dependent child during the reporting year of any real property, stocks, bonds, commodities futures, or other securities when the amount of the transaction exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. Do not report a transaction between you, your spouse, or your dependent child, or the purchase or sale of your personal residence, unless it is rented out. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
	3M	P	N/A	7-2-10	\$1,001 - \$15,000
	AMR	S	Yes	1-22-10	\$100,001 - \$250,000
	AMR	P	Yes	various	\$250,001 - \$500,000
	AMR	S	Yes	10-20-10, 11-24-10, 11-5-10	\$250,001 - \$500,000
	AMR	P	N/A	7-15-10, 11-10-10, 11-29-10	\$250,001 - \$500,000
	AMR	S	No	various	\$250,001 - \$500,000
	AMR Call Dec 18	P	N/A	10-21-10	\$1,001 - \$15,000
	AMR Call Dec 18	S	Yes	12-17-10	\$1,001 - \$15,000
	AT&T	S	Yes	12-7-10	\$1,001 - \$15,000
	AT&T	P	N/A	6-29-10	\$1,001 - \$15,000
	Australian Government Bond	S	Yes	9-3-10	\$15,001 - \$50,000

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Report any purchase, sale, or exchange by you, your spouse, or dependent child during the reporting year of any real property, stocks, bonds, commodities futures, or other securities when the amount of the transaction exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. Do not report a transaction between you, your spouse, or your dependent child, or the purchase or sale of your personal residence, unless it is rented out. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
	Australian Government Bond	P	N/A	5-20-10	\$15,001 - \$50,000
	Becton Dickinson	P	N/A	7-2-10	\$1,001 - \$15,000
	Becton Dickinson	S	Yes	12-1-10	\$1,001 - \$15,000
	BHP Billiton	S	Yes	1-11-10	\$1,001 - \$15,000
	Biotech ETF SPDR	S	Yes	3-29-10	\$1,001 - \$15,000
	Biotech ETF SPDR	P	N/A	various	\$1,001 - \$15,000
	BP PLC	S	Yes	4-27-10	\$1,001 - \$15,000
	BP PLC	P	N/A	2-1-10	\$1,001 - \$15,000
	Cisco	P	N/A	7-2-10	\$1,001 - \$15,000
	Coca Cola	S	Yes	10-1-10	\$1,001 - \$15,000
	Dow US Home Construction	S	No	10-26-10	\$1,001 - \$15,000

SCHEDULE IV - TRANSACTIONS

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Report any purchase, sale, or exchange by you, your spouse, or dependent child during the reporting year of any real property, stocks, bonds, commodities futures, or other securities when the amount of the transaction exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. Do not report a transaction between you, your spouse, or your dependent child, or the purchase or sale of your personal residence, unless it is rented out. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
	EQA Call Jan 75	S	Yes	1-4-10	\$1,001 - \$15,000
	EQA Call Jan 75	P	N/A	1-14-10	\$1,001 - \$15,000
	Fid Japan Fund	S	No	12-27-10	\$1,001 - \$15,000
	FID Japan Sm Co	S	No	12-27-10	\$1,001 - \$15,000
	Fid Muni MKT	P	N/A	12-27-10	\$100,001 - \$250,000
	Fidelity Capital and Income	P	N/A	12-27-10	\$50,001 - \$100,000
	Fidelity Contra Fund	P	N/A	12-28-10	\$100,001 - \$250,000
	Fidelity Conv Sec	P	N/A	12-28-10	\$100,001 - \$250,000
	Fidelity Growth	P	N/A	12-27-10	\$100,001 - \$250,000
	Fidelity Japan Fund	S	No	12-28-10	\$1,001 - \$15,000
	Fidelity Japan Small Co	S	No	12-28-10	\$1,001 - \$15,000

SCHEDULE IV - TRANSACTIONS

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Report any purchase, sale, or exchange by you, your spouse, or dependent child during the reporting year of any real property, stocks, bonds, commodities futures, or other securities when the amount of the transaction exceeded \$1,000. Include transactions that resulted in a loss. Provide a brief description of any exchange transaction. Do not report a transaction between you, your spouse, or your dependent child, or the purchase or sale of your personal residence, unless it is rented out. If only a portion of an asset is sold, please so indicate (i.e., "partial sale"). See example below.

SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
	Fidelity Lo Price Stock	S	No	1-22-10	\$100,001 - \$250,000
	Fidelity Mid Cap	P	N/A	12-31-10	\$15,001 - \$50,000
	First South Bank	S	No	7-9-10	\$1,001 - \$15,000
	GE	S(part)	No	3-15-10	\$1,001 - \$15,000
	GE	S	Yes	3-15-10	\$1,001 - \$15,000
	High Yield (JNK)	S(part)	Yes	1-22-10	\$100,001 - \$250,000
	Household Fin Corp Bond	S	No	8-1-10	\$1,001 - \$15,000
	iBoxx High Yield	S	Yes	2-22-10	\$1,001 - \$15,000
	iBoxx High Yield	S	Yes	2-22-10	\$1,001 - \$15,000
	International Lease Fin Corp	S	Yes	4-4-10	\$1,001 - \$15,000
	iShares Boxx Inv Grade Bond	S	Yes	9-7-10	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
	iShares Boxx Inv Grade Bond	P	N/A	9-7-10	\$1,001 - \$15,000
	iShares Brazil	S(part)	No	1-22-10	\$250,001 - \$500,000
	iShares EAFE	S	No	6-7-10	\$1,001 - \$15,000
	iShares FTSE China	S	No	2-8-10	\$1,001 - \$15,000
	iShares Global Steel	S	No	12-6-10	\$1,001 - \$15,000
	iShares Health Provider	S	Yes	3-29-10	\$1,001 - \$15,000
	iShares Med Device	S	Yes	3-29-10	\$1,001 - \$15,000
	iShares MSCI EAFE	S	No	6-7-10	\$1,001 - \$15,000
	iShares South Korea	S	Yes	3-3-10	\$100,001 - \$250,000
	iShares South Korea	P	N/A	2-19-10	\$100,001 - \$250,000
	iShares US Home Const	S	No	10-26-10	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
	iShares US Pharma	S	Yes	3-29-10	\$1,001 - \$15,000
	iShares Util	S(part)	No	9-16-10	\$250,001 - \$500,000
	iShares Util Call Aug 31	P	N/A	7/15/10	\$1,001 - \$15,000
	iShares Util Call Aug 31	S	Yes	8-23-10	\$1,001 - \$15,000
	iShares Util Call May 30	P	N/A	9-17-10	\$1,001 - \$15,000
	iShares Util Call May 30	S	Yes	9-1-10	\$1,001 - \$15,000
	iShares Util Call May 30	S	Yes	4-22-10	\$1,001 - \$15,000
	iShares Util Call May 30	P	N/A	5-24-10	\$1,001 - \$15,000
	JNK	S	Yes	4-20-10, 4-29-10	\$100,001 - \$250,000
	JNK	S	Yes	1-22-10	\$50,001 - \$100,000
	JPM	S	Yes	2-12-10, 7-14-10, 10-12-10	\$100,001 - \$250,000

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SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
	JPM	P	N/A	1-15-10, 5-17-10, 10-1-10, 10-13-10	\$100,001 - \$250,000
	LSI	S(part)	No	4-5-10, 11-12-10	\$250,001 - \$500,000
	LSI	P	N/A	1-7-10, 2-19-10, 4-29-10, 7-28-10, 12-30-10	\$250,001 - \$500,000
	Medtronic	P	N/A	7-1-10	\$1,001 - \$15,000
	Microsoft	S	No	12-30-10	\$1,001 - \$15,000
	Microsoft	P	N/A	7-6-10	\$1,001 - \$15,000
	Microsoft	S	No	7-29-10	\$1,001 - \$15,000
	Microsoft	S	No	7-29-10	\$1,001 - \$15,000
	Microsoft	P	N/A	7-6-10	\$1,001 - \$15,000
	Oracle	P	N/A	7-6-10	\$1,001 - \$15,000
	Oracle	S	Yes	9-10-10	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
	Power Shares Dyn. Network	P	N/A	10-12-10	\$1,001 - \$15,000
	Power Shares Global Steel	S	No	12-6-10	\$1,001 - \$15,000
	Power Shares Global Steel	P	N/A	various	\$1,001 - \$15,000
	Power Shares Tr. Wilder Hill	S	No	3-8-2010	\$1,001 - \$15,000
	Power Shares Wilder Hill Energy	S	No	3-8-10	\$1,001 - \$15,000
	Proctor & Gamble	S	No	3-15-10	\$1,001 - \$15,000
	Proctor Gamble	S	No	3-15-10	\$1,001 - \$15,000
	SPDR Cons Disc	P	N/A	10-29-10	\$1,001 - \$15,000
	SPDR Tech	S	Yes	10-6-10	\$1,001 - \$15,000
	SPDR Tech	S	Yes	9-6-10	\$1,001 - \$15,000
	Sun Micro	S	No	1-28-10	\$15,001 - \$50,000

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SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
	US Air Call July 9	P	N/A	7-19-10	\$1,001 - \$15,000
	US Air Call Mar 8	S	Yes	3-10-10	\$1,001 - \$15,000
	US Airways	P	N/A	1-26-10, 6-29-10, 7-12-10, 7-13-10, 7-8-10, 11-8-10	\$500,001 - \$1,000,000
	US Airways	S	Yes	1-15-10, 2-19-10, 5-21-10, 7-7-10, 7-13-10, 7-16-10, 9-17-10, 10-26-10	\$500,001 - \$1,000,000
	US Airways Call Aug 10	P	N/A	8-23-10	\$1,001 - \$15,000
	US Airways Call Aug 10	S	Yes	7-22-10	\$1,001 - \$15,000
	US Airways Call July 9	S	Yes	7-8-10	\$1,001 - \$15,000
	US Airways Call Mar 8	P	N/A	3-22-10	\$1,001 - \$15,000
	Vanguard TTL MKT Index	P	N/A	12-28-10	\$100,001 - \$250,000
	Verizon	S	Yes	10-12-10	\$1,001 - \$15,000

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SP, DC, JT	Asset	Type of Transaction	Capital Gain in Excess of \$200?	Date	Amount of Transaction
	Verizon	P	N/A	6-29-10	\$1,001 - \$15,000